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U.S. Department of Agriculture
Office of the Secretary

Nov. 18, 1965
Nat'l Broiler Council

THE CUSTOMER SPEAKS HER MIND

There are times when I think the world today is one vast numbers game. We've got area codes to make telephone calls. Zip code numbers for our mail. It takes a number to get your money out of the bank--or to put it in.

In business, there are cost figures and sales figures and profit figures. There are production figures, and consumption figures. I'm not against them, you understand. I have worked for a long time for the agency that is in the business of gathering significant agricultural statistics. And statistics can be downright cheering. Like profit figures--when they go up. Or take the figures for poultry consumption--up about 5 pounds per person in just the last seven or eight years.

But such figures are only part of the story for any industry. They tell us what's going on. Another part is the "why"--why are the customers buying more of this, less of that? And that is what I'm talking about today, the opinions and attitudes of your customers. Or, as the title of this paper suggests, I'm talking about what is on your customer's mind when she goes shopping for chicken.

Remarks by Deputy Assistant Secretary of Agriculture Trienah Meyers at the annual conference of the National Broiler Council, New Marriott Motor Hotel, Atlanta, Georgia, November 18, 1965.

The Department of Agriculture, as you know, recently studied the consumer's reaction to poultry. The survey provided information about some of the factors that influence demand. It gave your customers--the nation's homemakers--a chance to speak out about poultry and poultry products.

The study was conducted by the Special Surveys Branch of the Statistical Reporting Service. These are the people who conduct the Department's attitude studies. They are specialists in collecting information--the kind of information that gets behind observed events, behind those statistics on consumption to tell us not only how much chicken people are eating, but why they eat it.

I know quite a bit about this capable group of people and how they conduct their research projects. At the time the poultry study was undertaken, I was in charge of the group.

Here are some of the questions we had in mind when we put the survey together. We wanted to know, for instance, if high-income families eat chicken as often as low-income families. And we were concerned with problems like "chicken fatigue," something that worries the industry. Are more recipes needed to provide menu variety? And, why are so many customers unwilling to buy frozen chicken?--yet willing to take fresh chicken home and freeze it themselves.

Of course, no one study could answer these and all questions that could be raised about the consumer's opinions of poultry. We limited ourselves to the amount of information that could be gathered during an interview lasting about 45 minutes. Experience has shown us that 45 minutes is about as long as a respondent can be interviewed on food studies such as this--and stay interested and responsive to the questioning.

Because of the size of the study, we contracted it out to a private market research firm, a firm we could work closely with every step of the way. This was the same firm that had conducted another study for us on consumer preferences for poultry and poultry products some years back.

Before we started the new survey, we undertook an intensive, small-scale study designed to identify psychological, social, and other factors related to the purchase and use of poultry products.

By the summer of 1964, we had developed and tested our questionnaire, and we were ready to go. We conducted personal interviews with over 2,600 homemakers -- a scientifically selected, probability sample of homemakers scattered from coast to coast, in cities of all sizes and in open farm areas.

A preliminary report of some of the findings of this study has already been published. It's available for those of you who would like a copy. The final report, which will include much more detail, will be published next year. It will have some information on turkeys, as well as more information about broilers. Today, I'll just hit some of the highlights of this study.

Judging by reports from homemakers, chicken is a 'national' meal. Almost all of our respondents reported using chicken in the preceding year. To be precise, 97 percent did -- an increase of 4 percentage points between the two studies. Of the four regions in our sample, the northeast area showed the greatest increase, a total of 7 percentage points.

We know that almost everyone eats chicken; the question is, how often?

In 1956, only one-half the families ate chicken at least once a week. In the new study, two-thirds served it at least every week. The frequency of serving had increased in all subgroups of the population in the eight-year interval.

To sharpen memory, we asked the respondents how often they had served broiler-fryers during the week just before the interview. The proportion of homemakers who had served chicken two or more times in the preceding week increased from about 2 in 10 in 1956 to 3 in 10 in 1964. It is apparent that not only are more homemakers serving chicken -- they are serving it more frequently.

But what about the homemakers who serve chicken infrequently? Homemakers who said they served chicken less than once a week were asked: "How come you don't serve broilers or fryers more often?" At the top of the list were two reasons -- a general dislike of chicken by certain members of the family, and a feeling on the part of the homemaker that if she served chicken more often her family would tire of it. Relatively few homemakers mentioned objections to price, diet problems or specific characteristics of chicken.

Homemakers who said they were using chicken more frequently, compared with four or five years ago, were asked what caused the increase. The dominant influence was price. Nearly half mentioned that chicken was more economical than it was four or five years earlier. In contrast, only about 3 in 10 of the homemakers responding to a similar question in the earlier survey said that broilers and fryers had become more economical.

Another reason homemakers now serve chicken more frequently is the marked trend toward weekday use. In 1964 chicken was served by more homemakers on weekdays than on Sundays. In 1956 the opposite was true.

According to our data, it looks as though outdoor cooking may also have stimulated the use of broiler-fryers. About one-third of our homemakers said they had cooked chicken outdoors during the preceding year, compared with only a tenth of the homemakers in '56. Outdoor cooking has increased significantly in all regions and among all subgroups of the population, with the largest gains among younger homemakers, homemakers in the upper income and educational groups, and among larger families.

Along with the trend toward cooking broiler-fryers outdoors, there is an increase in the proportion of homemakers who use chicken in ways other than frying. Although frying continues to be the most common method of preparation, the proportion of homemakers frying chicken (87 percent) has declined 7 percentage points since 1956. Use of some other method of preparing chicken has increased considerably. For example, the proportion of homemakers reporting they had stewed or boiled chicken went from 11 to 47 percent; barbecued went from 17 to 47 percent. Some of the difference in results between the earlier study and the current one might be due to a change in the questioning technique. But the effect of such change should be minor. Our interpretation is that there has been a real trend toward barbecuing, baking, and other methods of cooking chicken.

Despite these changes, many homemakers do not seem to be quick to try new recipes. Only a fourth reported trying a new recipe within the year. The use of new methods of preparing chicken seems to be directly related to homemakers' socio-economic levels. As these levels increase, so does the likelihood of trying new ways of cooking chicken.

The survey also touched on seasonality of use. Homemakers were asked which method of preparation they used most often in the winter, and which in the summer. There seems to be little difference in seasonal use of fried or broiled chicken. But baking or roasting and stewing or boiling chicken appear to be winter dishes. Barbecuing, on the other hand, is almost exclusively a summer activity.

Now to shift from the use patterns to purchasing practices and preferences. When respondents were asked which forms of chicken they had purchased most often within the past 12 months, about half reported they usually bought broiler-fryers as whole birds. Another 20 percent said they bought the whole bird, but preferred it cut up. And about the same proportion usually purchased legs, thighs, or breasts. Relatively few women reported frequent purchase of wings or backs or the whole bird split in two.

Women who most often bought a whole bird were asked why they did. Forty-three percent said it was more economical. Some other reasons were a liking for all the parts or preferring to cut up the bird themselves. The women who usually bought the whole chicken already cut up, said it was because it saved time, or they didn't like to cut it themselves, or the family liked all the parts. By far the most frequent reason given by women who tended to purchase individual parts was that the family preferred that part. Also, well over half of this group said that the number of parts was more important than the total weight when selecting a package.

But whatever women buy -- whole bird or parts -- they say they pay more attention to price per pound than to total price. Almost half considered price per pound more important, while only a third selected total price as the more important.

Let's turn now to some of the things women think about when they are buying chicken. One of the questions read: "Here is a list of things some people look for to be sure they get good chicken. Which of these do you look for when selecting a broiler or fryer?" Homemakers said they were primarily interested in getting chicken that is: well-cleaned, without bruises or discoloration, the right size, inspected by the government, plump and with no pinfeathers.

Regardless of the form in which they buy it, women are tempted to buy more chicken when the price goes down. Half said they buy more chicken than they otherwise would when prices are lower than usual. But more of this extra poundage goes into the freezer for future use. Of course, stocking up on chicken was more usual for those homemakers who had separate freezer units.

In spite of the habit of freezing chicken at home, commercially frozen chicken does not seem to be a popular item. Only a third of the women said they had purchased frozen chicken during the preceding year. And almost half had never bought a frozen chicken. Many women seem to fear the chicken may have been frozen too long.

The consensus among homemakers is that broiler-fryers are better today than they were eight or ten years ago. Over half the women gave reasons why they thought broiler-fryers are better now. In contrast, only a fourth gave scattered reasons for thinking broiler-fryers are not as good as they used to be.

Shifting back for a moment to the planning stages of the study, you'll remember I said that some of the industry advisors expressed concern about "chicken fatigue." They suspected that many women do not serve chicken more often because they fear their families would tire of it. To explore this possible barrier to increased use, homemakers were asked how often they thought they could serve each of six different meat items -- once, twice, or three times a week? The meats were beef, chicken, pork, lamb, turkey, and frankfurters. At all levels of use, chicken scored second only to beef, and well above the other meats.

We found that most homemakers appear to be serving chicken at a rate well below what they consider to be the maximum. Among women who were actually serving broiler-fryers about once a week (40 percent of the users), a large majority (7 out of 10) said they thought they could serve chicken at least one more time per week without the family's getting tired of it. Among women who were serving chicken only two or three times a month (23 percent of the users), most thought they could serve chicken at least once a week before their family would tire of it. Half said they could serve it at least twice a week.

At this point I should enter a note of caution. It must be remembered that there is a wide gap between tolerance and preference. We know this because the respondents were also asked whether individual family members, including themselves, 'would like to have broiler-fryers served more often, less often, or about the same as now.' A majority of the family members in each of the age groups were reported by homemakers as preferring to have chicken served at the current rate. However, many of the women believed their children -- especially those under 13 -- would like to have chicken served more often. But they themselves, as well as the men in the family, would rather not have chicken more often.

The exploratory interviews conducted during the planning stages provided some insights on this point. Any initial resistance the homemaker may feel to more frequent serving of poultry tends to dissipate when she is encouraged to think about ways of putting variety into her chicken dishes or serving chicken at lunchtime as well as for the evening meal.

So far we've been talking about some of the day-by-day reactions of homemakers to chicken. But what about its overall image? Respondents were asked to indicate their reaction to broiler-fryers by selecting from a list of descriptive statement the ones that fitted their impressions. Now, failure to select a particular item does not necessarily mean the respondent agreed or disagreed with the statement. It indicates only that the particular phrase or idea was not part of her mental image of the product.

This is what the results look like. The strongest "associations" homemakers have with broiler-fryers are convenience, versatility, economy and flavor. The seven phrases that respondents selected most often to describe their image of broiler-fryers were:

- 1) "Easy to prepare"
- 2) "Makes a good Sunday meal"
- 3) "Less expensive per serving than other meats"
- 4) "It is very tasty"
- 5) "Makes a good weekday meal"
- 6) "Good for serving guests"
- 7) "Can be served many ways"

Each of these statements was selected by about two-thirds of the respondents (59-69 percent). Incidentally, one of the unfavorable alternatives on the list -- "takes a long time to prepare" -- was rarely selected.

Other associations -- chosen by about half the homemakers were: "It is easy to buy just the amount you need" and "It smells good while it is cooking." On the negative side, we found that homemakers do not have favorable impressions of broiler-fryers when it comes to festive occasions, eating out, or using chicken for sandwiches. Statements along these lines were chosen by only about one-third of the homemakers.

Homemakers seem to know little about two important subjects regarding chicken--its nutritional value and the effect of freezing. The phrase "high in protein" was chosen by only 25 percent of the respondents; "low in calories" by 20 percent. Those who picked a statement about freezing were divided in their opinion. About 20 percent thought that "quick freezing preserves the quality" while about 15 percent selected "freezing takes away from the flavor."

Before I finish I would like to pass along a few of the comments we collected about the use of 'convenience' poultry products. Two-thirds of the homemakers said they had bought some of the convenience items we asked about within the previous year.

Frozen chicken pot pies led the list of convenience items bought. They were followed by frozen turkey pot pies, frozen chicken dinners, frozen turkey dinners, and barbecued chicken. Looking at the most popular items -- frozen pies and dinners -- we found that the use of turkey dinners had increased markedly since the 1956 study. The proportion reporting the use of frozen chicken and turkey pies remained at about the same level.

In general, convenience poultry items were purchased most frequently by homemakers in the upper income and educational levels, by those with three or more family members, and by those under 30 years of age. Also, convenience items were more popular in the West than in other areas.

In proper research fashion, I'll end with a footnote -- a disclaimer of sorts. We haven't had the time yet to evaluate all the findings in the context of data from other sources. We may find relations which are not apparent at this time. And, since my remarks today are being released before final review and analysis of the data, there is the possibility of minor changes in the figures.

Our respondents, by the way, were women. And they had a lot more to say about what they liked and didn't like about chicken. These opinions have been just a few of their remarks. We'll have the rest of them for you later on in the final report.

